

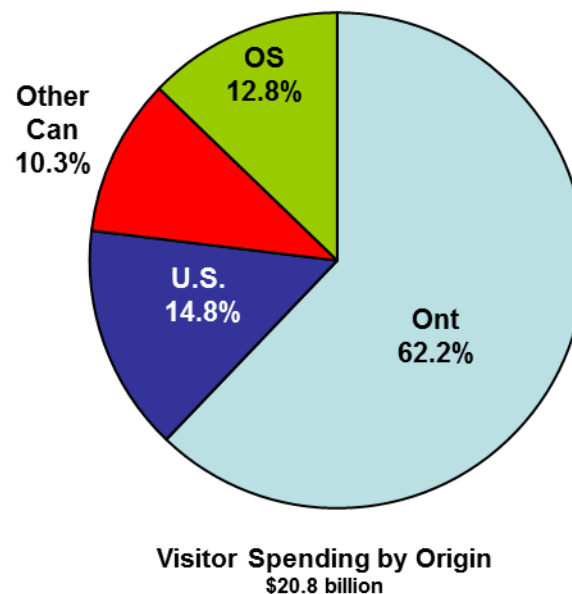
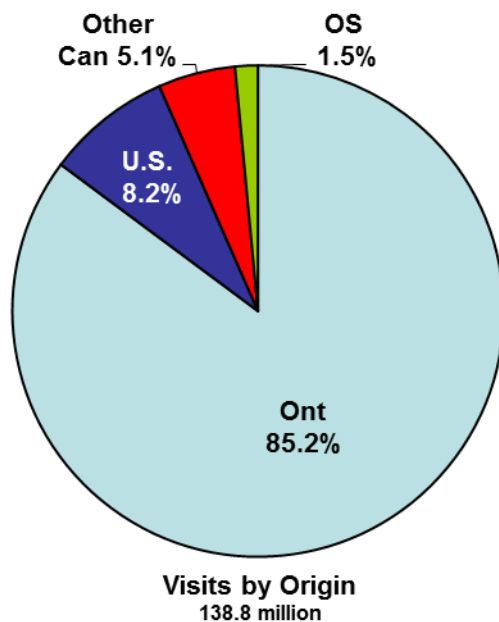
Tourism Statistics Muskoka District

Tourism Research Unit
Spring 2014

**Note: due to changes in Statistics
Canada's survey methodology, 2011
domestic data is not comparable to
prior years**

Ontario Tourism

Visits and Spending

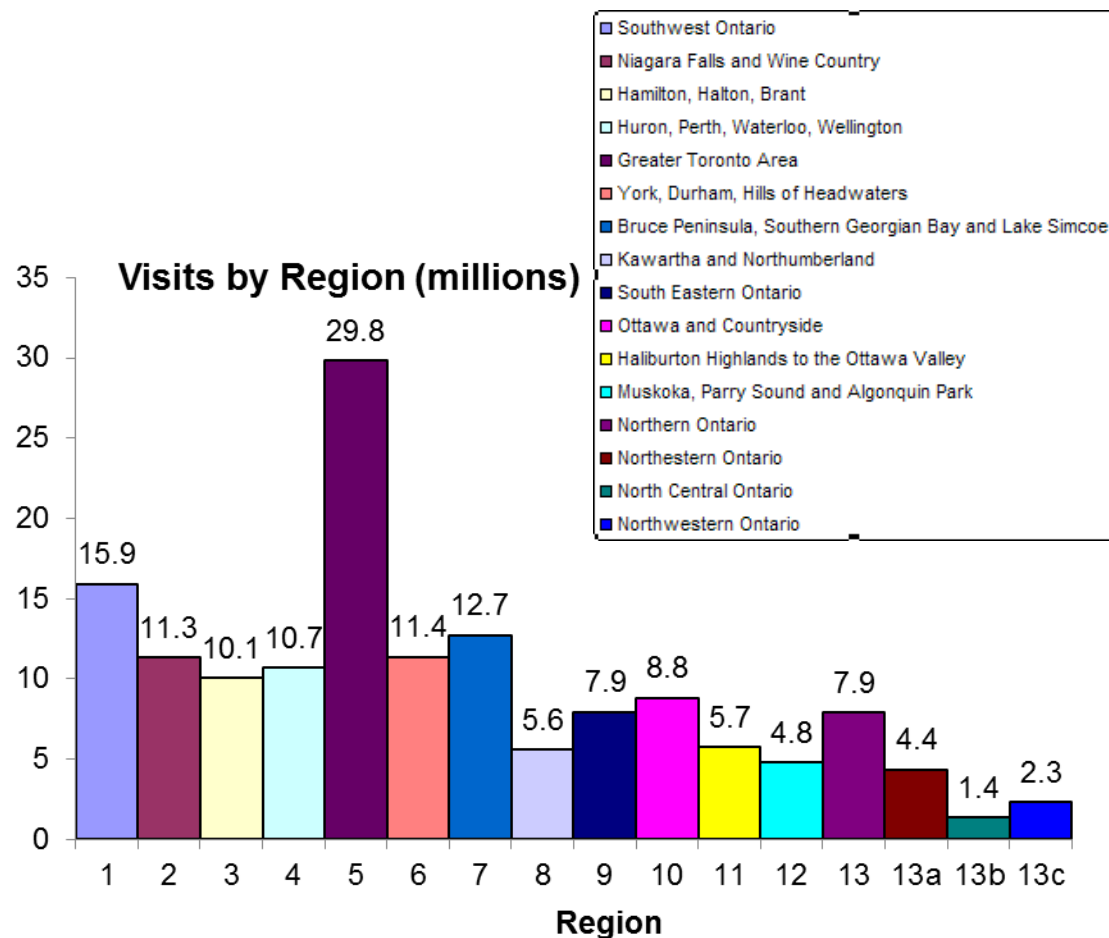


- In 2011, there were 138.8 million visits in Ontario and visitors spent \$20.8 billion
- Ontario residents account for the majority of visits and spending
- U.S. visitors represent 8% of visits and 15% of expenditures
- Overseas visitors account for 2% of visits and 13% of spending

Source: Statistics Canada, Travel Survey of the Residents of Canada 2011, International Travel Survey 2011, Ontario Ministry of Tourism, Culture and Sport

Visits and Spending by Region

2011	Visits (millions)	Visitor Spending (\$ billions)
Ontario	138.8	20.8
Region 1	11.5%	7.0%
Region 2	8.2%	8.0%
Region 3	7.3%	3.7%
Region 4	7.7%	5.2%
Region 5	21.5%	32.3%
Region 6	8.2%	4.0%
Region 7	9.2%	5.9%
Region 8	4.0%	2.3%
Region 9	5.7%	3.9%
Region 10	6.4%	7.3%
Region 11	4.1%	2.1%
Region 12	3.4%	2.9%
Region 13	5.7%	6.8%



Source: Statistics Canada, Travel Survey of the Residents of Canada 2011, International Travel Survey 2011, Ontario Ministry of Tourism, Culture and Sport

Ontario Summary

- In 2011, there were 138.8 million visits in Ontario and visitors spent \$20.8 billion
- Ontario residents accounted for the majority of visits (85%) and spending (62%)
- U.S. visitors represented 8% of visits and 15% of expenditures
- Overseas visitors accounted for 2% of visits and 13% of spending
- Region 5 (GTA) is the largest Region representing 22% of visits and 32% of spending
- Visitors spent an average of \$150/trip in Ontario

Ontario Summary

- The largest proportions of expenditures were spent on Transportation (35%) and Food & Beverage (28%)
- 77% of U.S. visitors came from border states with 32% from New York and 29% from Michigan
- Ontario's 9 target overseas markets (U.K., Japan, Germany, France, Mexico, India, China, South Korea and Brazil) represented 51% of overseas visitors to Ontario. The U.K. was by far the leading overseas source market at 16% of overseas visits
- 65% of visits were same-day visits driven by Ontario residents
- Most trips were to visit friends and relatives (46%) or for pleasure (31%)
- The majority of overnight visitors stayed in private homes (65%) except U.S. visitors who are more likely to stay at a hotel/motel (46%)

Muskoka District Tourism

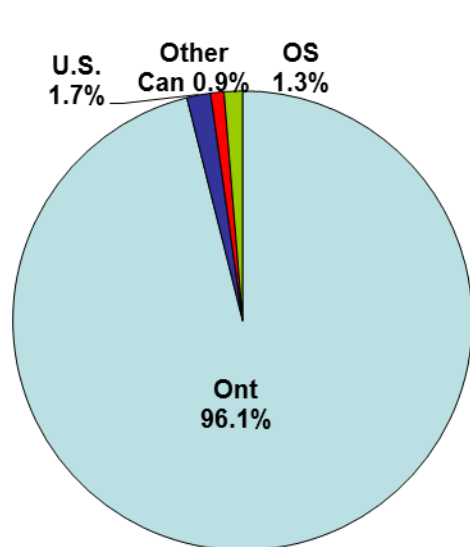
Total Visits and Spending

Region	Visits (millions)	Visitor Spending (\$ billions)
Ontario	138.8	20.8
Region 12	4.8	0.6
Region 12 proportion of Total Ontario	3.4%	2.9%
Muskoka District	3.0	0.4
MD proportion of RTO 12	63.6%	65.4%
MD proportion of Ontario	2.2%	1.9%

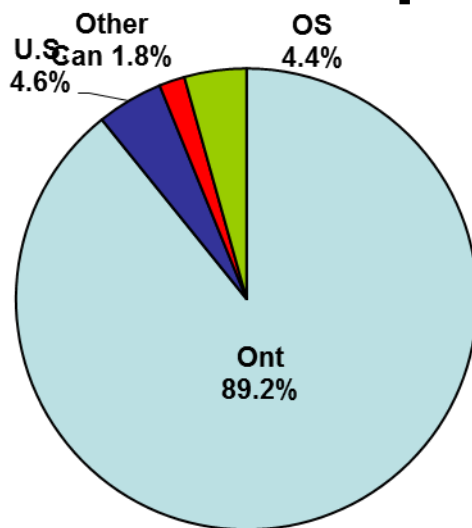
- In 2011, there were 3.0 million visits to MD, representing 2% of total visits to Ontario
- Visitors to MD spent \$391 million, accounting for 2% of total visitor spending in Ontario

Source: Statistics Canada, Travel Survey of the Residents of Canada 2011, International Travel Survey 2011, Ontario Ministry of Tourism, Culture and Sport

Visits and Spending



Visits by Origin
3.0 million



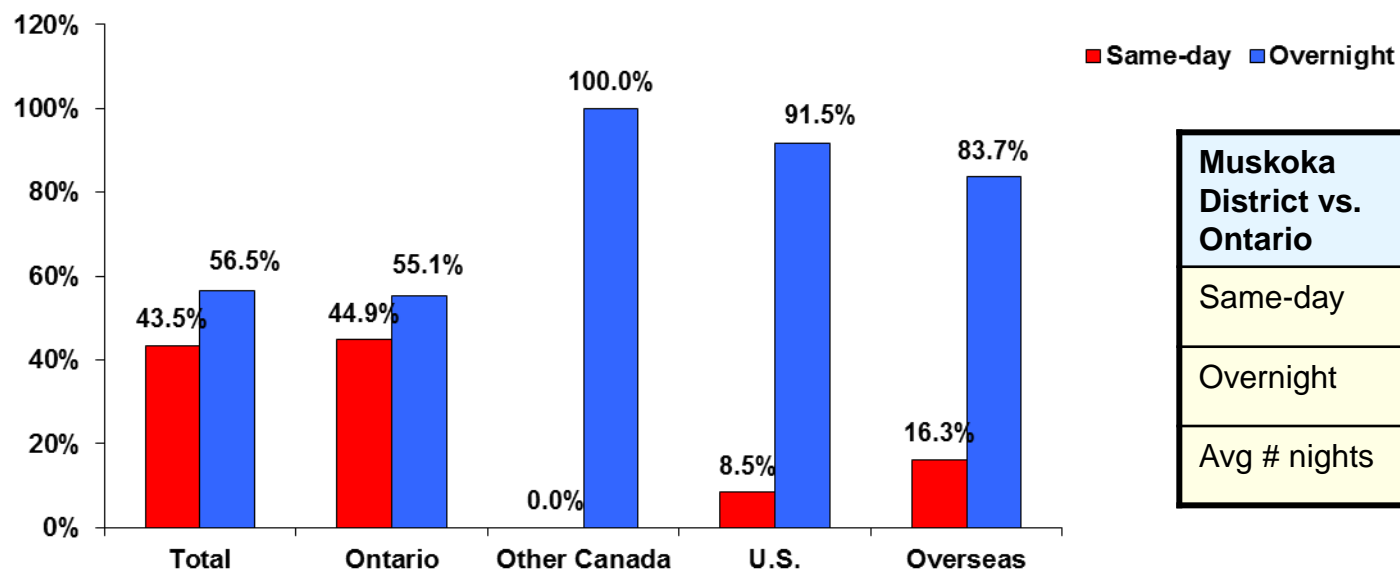
Visitor Spending by Origin
\$391 million

Muskoka District vs. Ontario	Visit Index	Spending Index
Ontario	113	144
U.S.	20	31
Other Canada	18	18
Overseas	86	34

- Ontario residents accounted for the vast majority of visits (96%) and spending (89%)
- U.S. visitors accounted for 2% of visits and 5% of expenditures.
- Visitors from Other Canada made up 1% of visits and 2% of spending
- Overseas visitors accounted for 1% of visits and 4% of spending

Source: Statistics Canada, Travel Survey of the Residents of Canada 2011, International Travel Survey 2011, Ontario Ministry of Tourism, Culture and Sport

Visits by Length of Stay



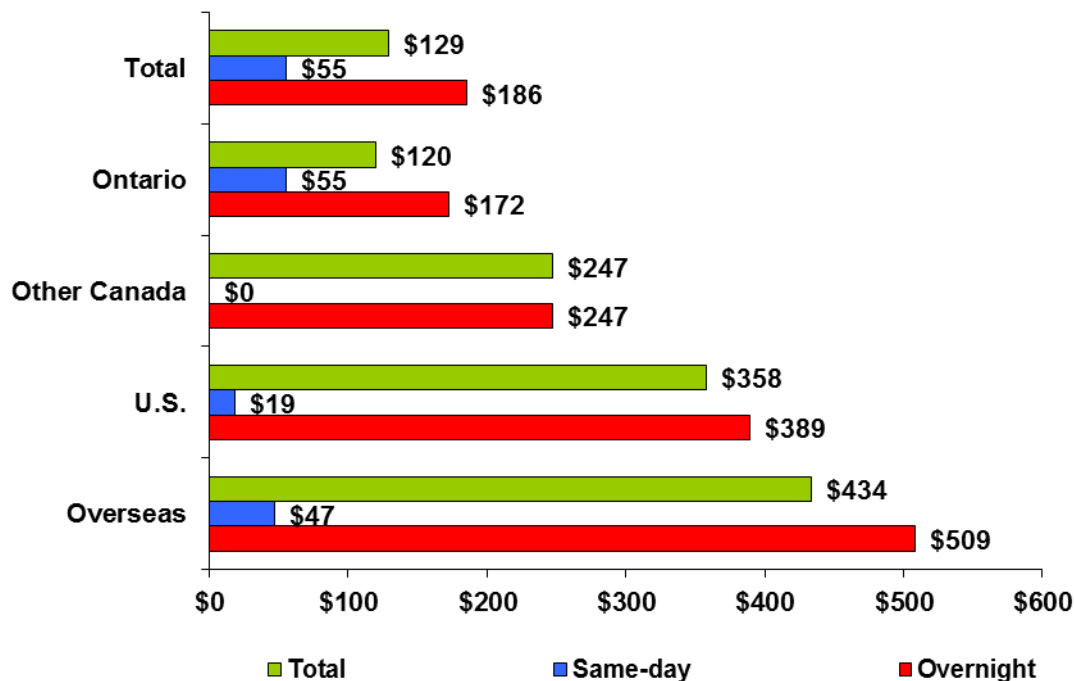
Muskoka District vs. Ontario	Length of Stay Index
Same-day	67
Overnight	162
Avg # nights	96

Average # of nights	2.8	2.7	4.1	4.9	5.5

- The majority (56%) of visits to Muskoka District were overnight visits. For comparison, 35% of visits in Ontario were overnight visits
- The average number of nights spent in Muskoka District was 2.8, slightly below Ontario's average of 2.9 nights

Source: Statistics Canada, Travel Survey of the Residents of Canada 2011, International Travel Survey 2011, Ontario Ministry of Tourism, Culture and Sport

\$/Trip by Length of Stay

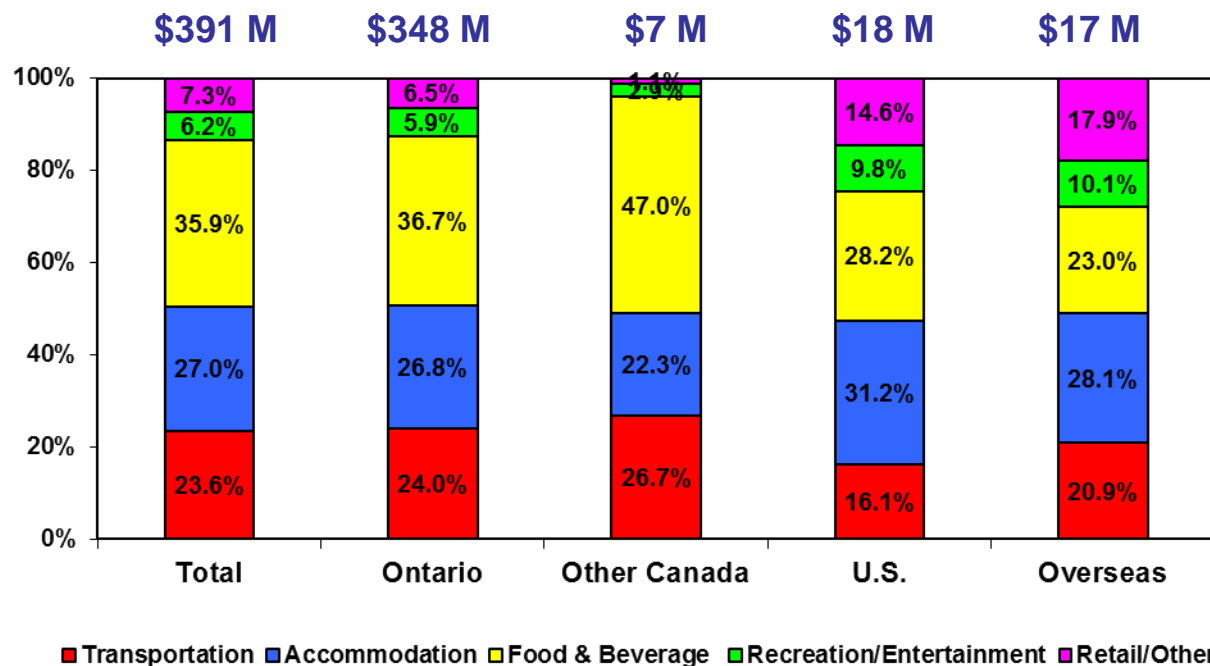


Muskoka District vs. Ontario	\$/Trip Index
Total	86
Ontario	109
Other Canada	82
U.S.	133
Overseas	34

- Visitors spent an average of \$129/trip in Muskoka District (\$150/trip for Ontario)
- On average, overnight visitors spent over 3 times as much as same-day visitors

Source: Statistics Canada, Travel Survey of the Residents of Canada 2011, International Travel Survey 2011, Ontario Ministry of Tourism, Culture and Sport

Spending by Category

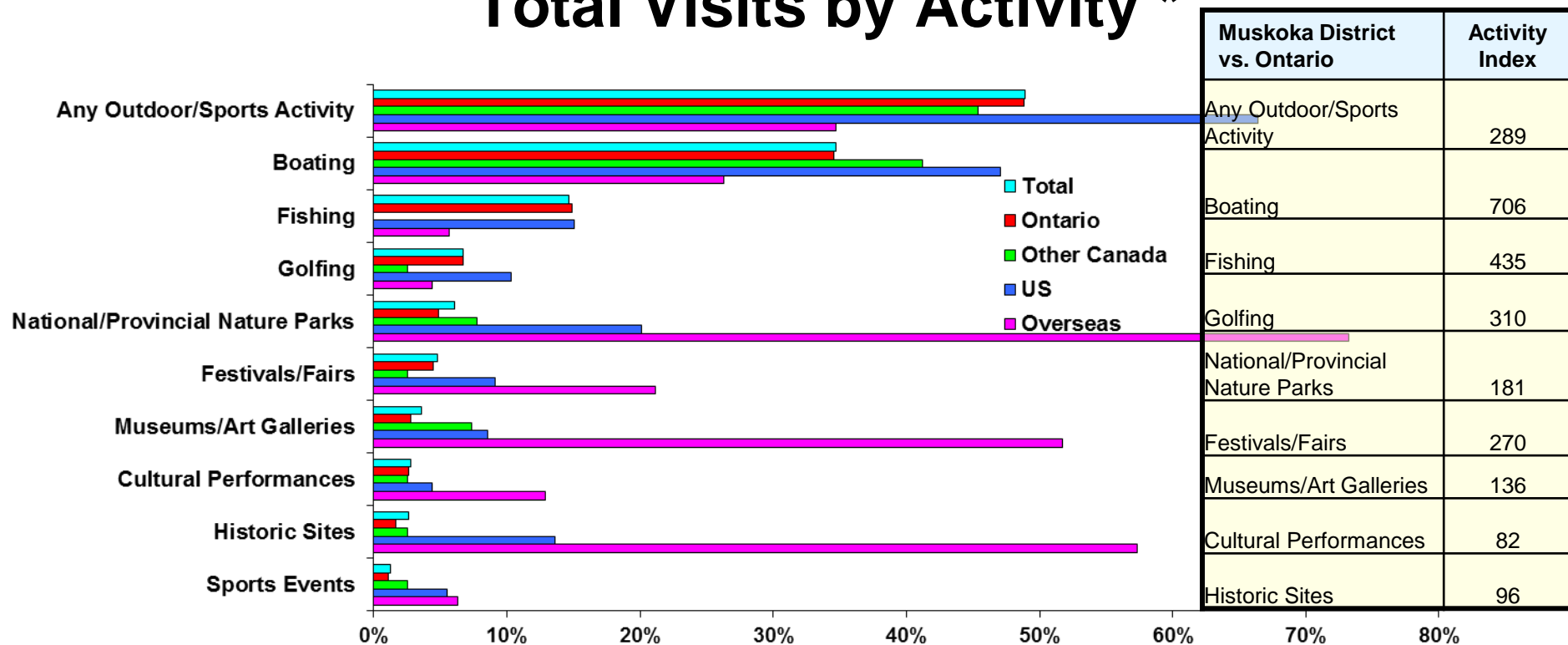


Muskoka District vs. Ontario	Spending Index
Transportation	67
Accommodation	176
Food & Beverage	129
Rec./Entertain.	75
Retail/Other	54

- The largest proportions of expenditures were spent on Food & Beverage, Accommodations and Transportation
- Ontario visitors in Muskoka District spent 59% of their Food & Beverage dollars at stores and 41% at restaurants. This compares to 26% at stores and 74% at restaurants for Ontario visitors travelling anywhere in Ontario

Source: Statistics Canada, Travel Survey of the Residents of Canada 2011, International Travel Survey 2011, Ontario Ministry of Tourism, Culture and Sport

Total Visits by Activity *

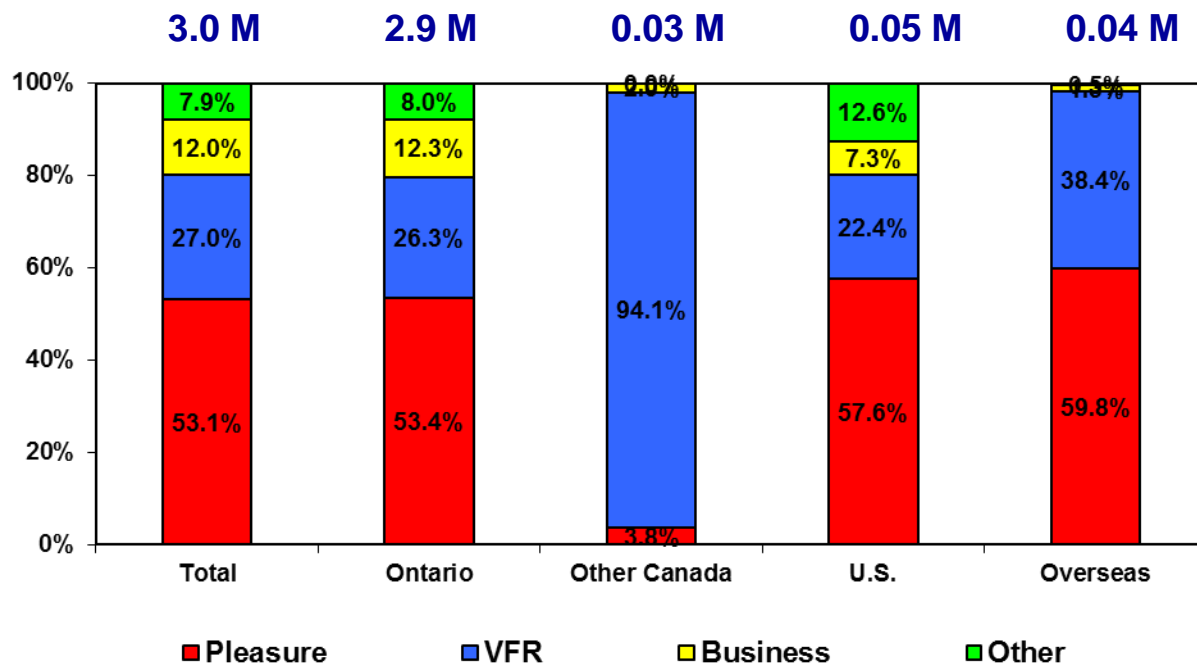


- In general, visitors to Muskoka District demonstrated a higher rate of participation in activities compared to visitors to other regions
- Outdoor activities are most popular
- Overseas visitors are more likely to visit historic sites and parks

*activity may or may not have taken place in region

Source: Statistics Canada, Travel Survey of the Residents of Canada 2011, International Travel Survey 2011, Ontario Ministry of Tourism, Culture and Sport

Main Purpose of Visit

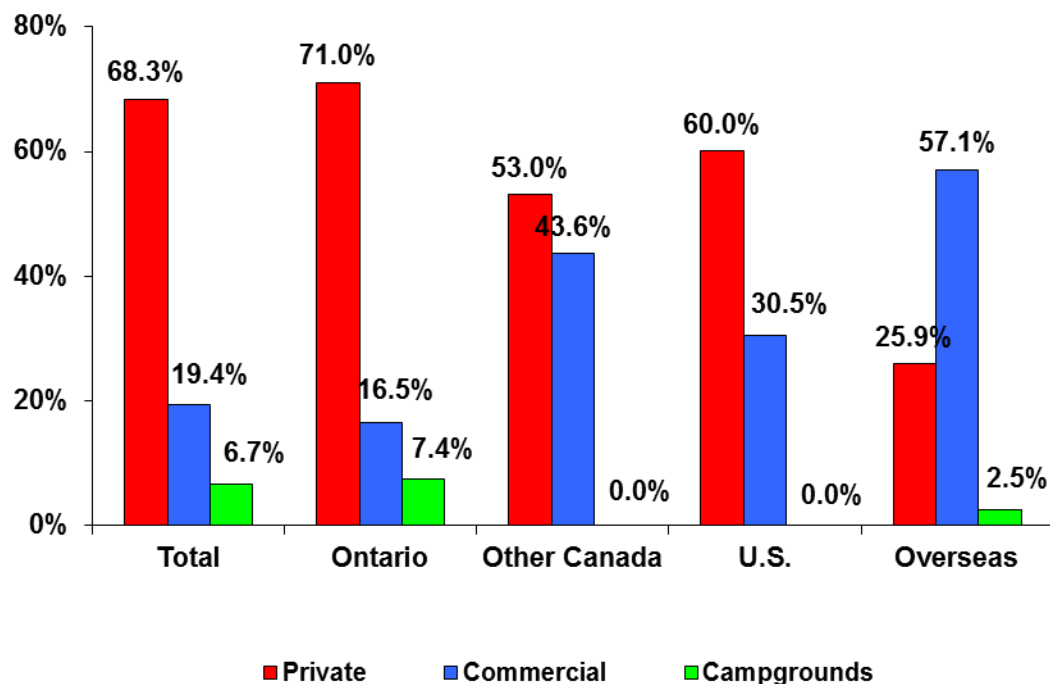


Muskoka District vs. Ontario	Purpose Index
Pleasure	169
VFR	58
Business	114
Other	68
VFR: Visiting Friends and / or Relatives	

- Trips to Muskoka District are mainly for pleasure
- Other includes shopping, medical, religious, hobby/trade show, etc.

Source: Statistics Canada, Travel Survey of the Residents of Canada 2011, International Travel Survey 2011, Ontario Ministry of Tourism, Culture and Sport

Visits by Accommodation Type

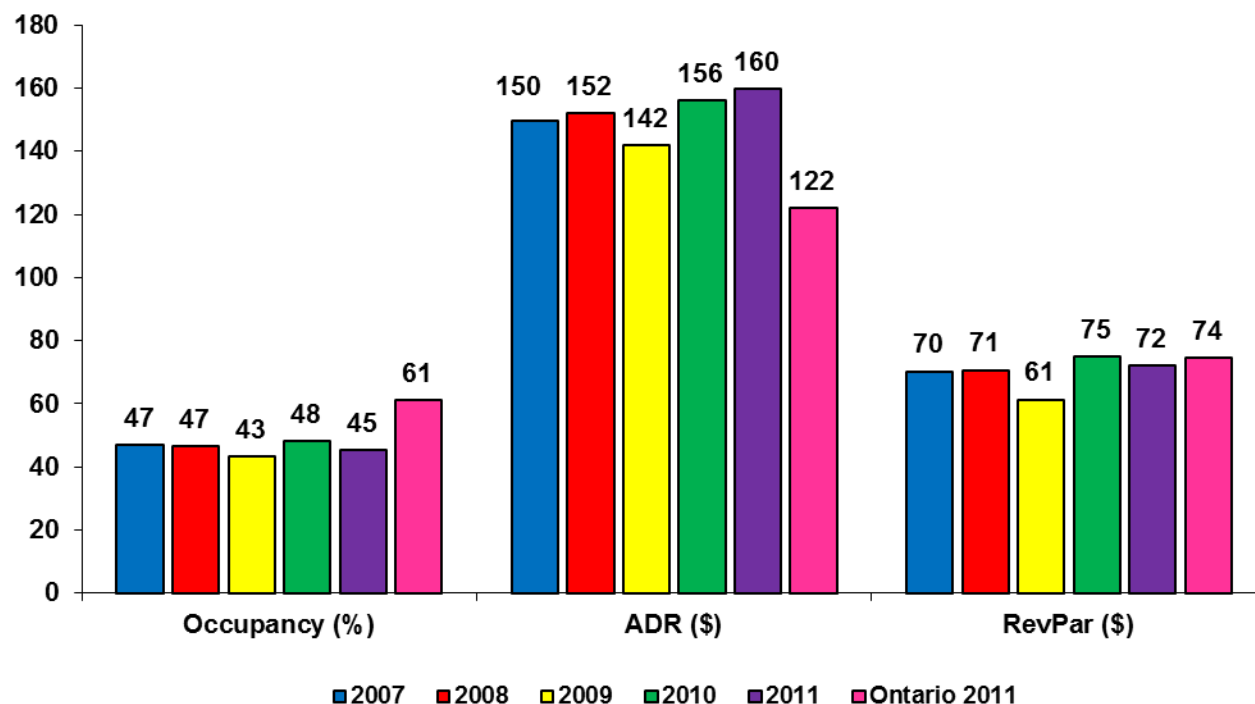


Muskoka District vs. Ontario	Type Index
Private	106
Commercial	79
Campground	116

- The majority of overnight visits to Muskoka District were spent at unpaid accommodations such as private homes and cottages
- Overseas visitors are more likely to stay in paid accommodations such as hotels and motels

Source: Statistics Canada, Travel Survey of the Residents of Canada 2011, International Travel Survey 2011, Ontario Ministry of Tourism, Culture and Sport

Hotel Statistics



Muskoka District vs. Ontario	Hotel Stats Index 2011
Occupancy	74
ADR	131
RevPar	97
ADR = Average Daily Rate RevPar = Revenue per Available Room	

- In general, occupancy and RevPar dropped from 2010 to 2011, but ADR improved during the same time period
- Muskoka District had lower occupancy and RevPar than total Ontario, but a higher ADR

Source: PKF Consulting, Ministry of Tourism and Culture

Park Statistics

Park	# Developed Campsites	Interior Camper-Nights	Visitors	Day Use	Bus Permits	Camper-Nights	Campers	July/Aug % Occupancy
Algonquin	1,330	245,655	818,696	213,312	433	347,126	89,007	77%
Arrowhead	378		117,411	24,368	1	93,043	28,195	79%
Six Mile	217		60,386	6,659	17	53,727	14,139	70%
Total	1,925	245,655	996,493	244,339	451	493,896	131,341	
% of Ontario	10%	51%	11%	6%	34%	10%	10%	

- Algonquin is the most popular camping destination in Muskoka District, with the largest number of visitors and overall nights spent

Source: Ontario Parks 2011

Tourism Related Establishments

Type of Establishment	# 2011*	% of Ontario
Accommodations	135	3%
Arts, Entertainment, Recreation	130	1%
Food & Beverage	148	1%
Transportation	20	0%
Travel Services	10	0%
Retail	431	1%
Other Services	187	1%
Total	1,061	1%

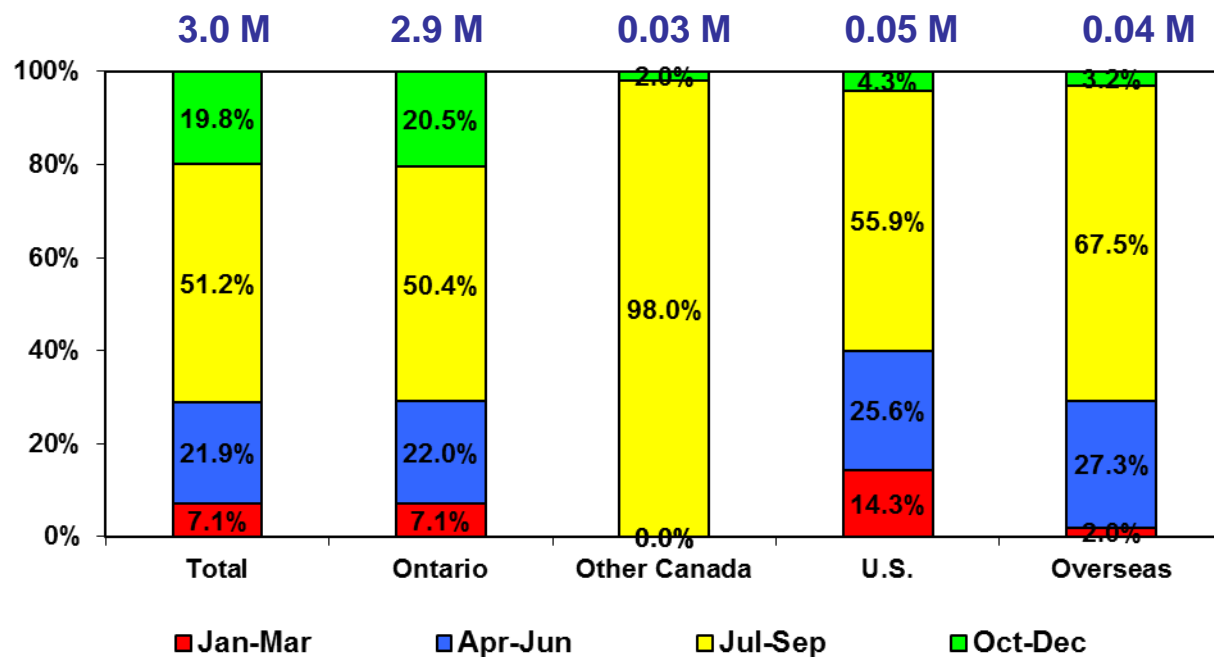
- Muskoka District accounts for 1% of Ontario's tourism related establishments

Note: Muskoka District represented 2% (3.0 M) of total visits and 2% (\$391 M) of visitor spending

**Represents the actual number of establishments in that category*

Source: Statistics Canada, Business Register 2011

Visits by Time of Year



Muskoka District vs. Ontario	Quarter Index
Jan-Mar	36
Apr-Jun	83
Jul-Sept	168
Oct-Dec	86

- The largest proportion of trips occur in the summer months, especially among visitors from outside Ontario
- The least number of trips take place in the winter months of January to March
- The region's seasonal pattern is more skewed to summer compared to Ontario

Source: Statistics Canada, Travel Survey of the Residents of Canada 2011, International Travel Survey 2011, Ontario Ministry of Tourism, Culture and Sport

Visits by Census Division Origin

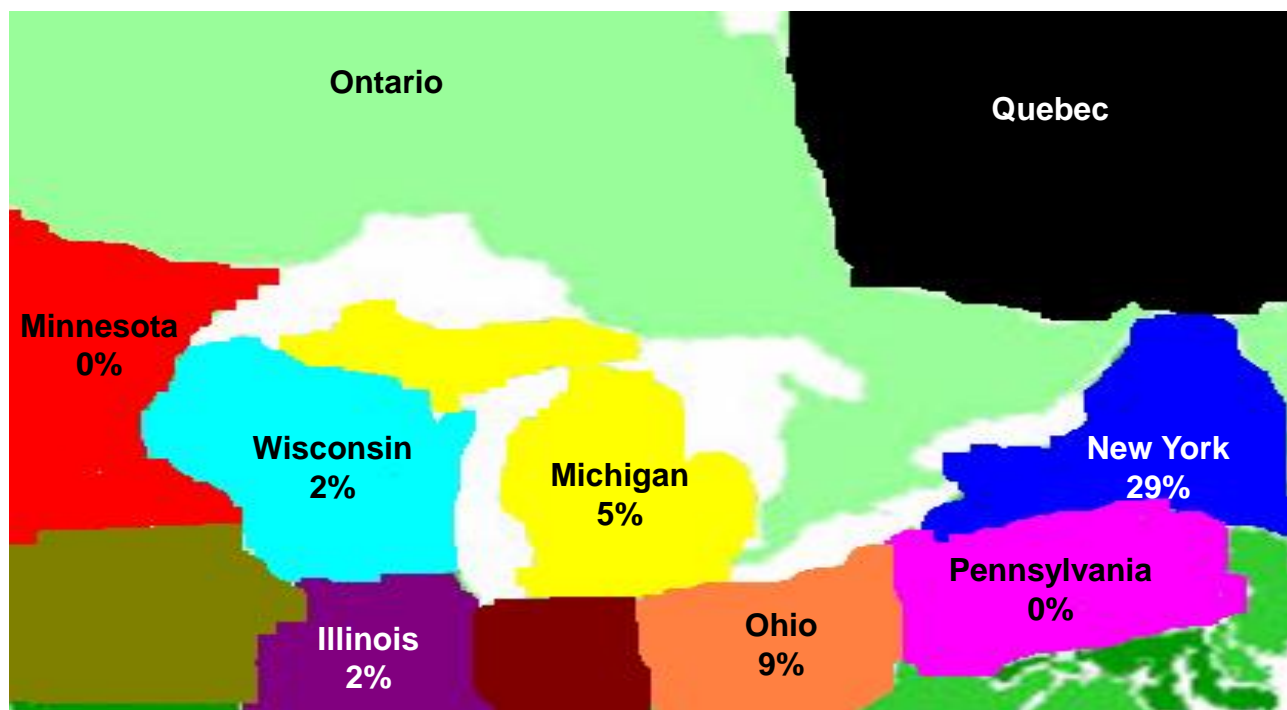
Origin	Visits	% of Visits
Toronto Metropolitan Municipality	610,244	21%
Durham Regional Municipality	350,998	12%
Simcoe County	334,256	11%
Parry Sound District	257,571	9%
Halton Regional Municipality	250,721	9%
Peel Regional Municipality	249,493	9%
York Regional Municipality	237,685	8%
Muskoka District Municipality	132,788	5%
Hamilton-Wentworth Regional Municipality	83,016	3%
Waterloo Regional Municipality	81,256	3%

- 21% of Ontario origin visits to MD originate from Toronto Metropolitan Municipality, 12% from Durham, and 11% from Simcoe County

Note: Ontario visitors to Muskoka District represented 96% (2.9 M) of total visits and 62% (\$348 M) of visitor spending

Source: Statistics Canada, Travel Survey of the Residents of Canada 2011, International Travel Survey 2011, Ontario Ministry of Tourism, Culture and Sport

U.S. Visitors by State of Residence

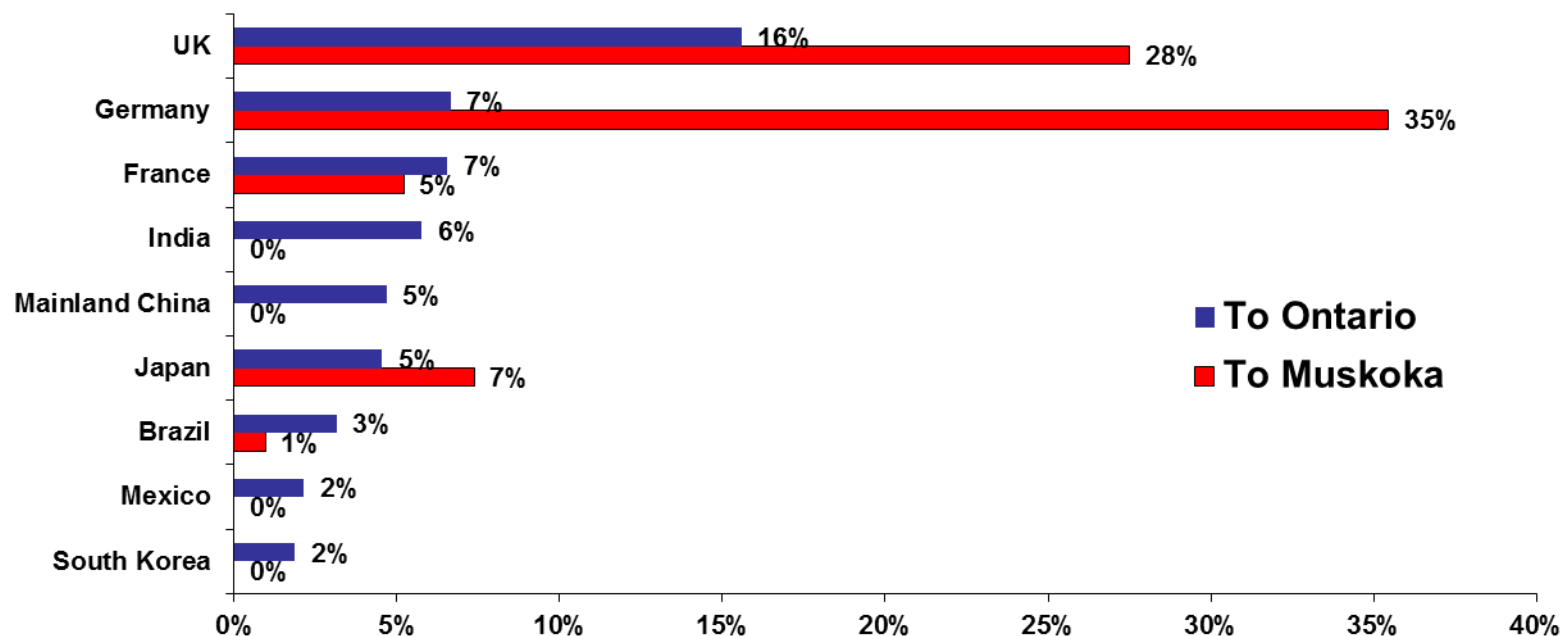


- 47% of U.S. visitors came from border states with 29% from New York

Note: U.S. visitors to Muskoka District represented 2% (51,000) of total visits and 5% (\$18 M) of visitor spending

Source: Statistics Canada, Travel Survey of the Residents of Canada 2011, International Travel Survey 2011, Ontario Ministry of Tourism, Culture and Sport

Overseas Visitors by Country of Residence



- Ontario's 9 overseas target markets represent 76% of overseas visitors to Muskoka District

Note: Overseas visitors to Muskoka District represented 1% (39,000) of total visits and 4% (\$17 M) of visitor spending

Source: Statistics Canada, Travel Survey of the Residents of Canada 2011, International Travel Survey 2011, Ontario Ministry of Tourism, Culture and Sport

Muskoka District Summary

- In 2011, there were 3.0 million visits in Muskoka District, accounting for 2% of total visits to Ontario. Visitors to Muskoka District spent \$391 million, or 2% of total visitor spending in Ontario
- Ontario residents accounted for the vast majority of visits and spending, residents of Other Canada accounted for 1% of visits and 2% of spending, U.S. visitors represented 2% of visits and 5% of expenditures, and Overseas visitors accounted for 1% of visits and 4% of spending
- Visitors spent an average of \$129/trip. Overnight visitors spent over 3 times as much per trip as same-day visitors.
- The largest proportions of expenditures were spent on Food & Beverage, Accommodations and Transportation

Muskoka District Summary

- 21% of visits to MD originate from Toronto Metropolitan Municipality, 12% from Durham, and 11% from Simcoe County
- 47% of U.S. visitors came from border states including 29% from New York State
- Ontario's 9 overseas target markets accounted for 76% of overseas visitors to Muskoka District
- The majority of visits were overnight
- Most trips were for pleasure trips
- The majority of overnight visitors stayed in unpaid accommodations

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